



Center for Earned Value Management

wInsight - “How to Use” Guide

Last Updated: Aug 2007



1. Mapping wInsight to a Database on the Hard Drive

wInsight uses a pre-formatted MS Access database and therefore, the wInsight database must be mapped to an existing database before using for the first time. The following are instructions for mapping databases located on a hard drive. (Note: This step is only done once, unless the database is renamed or moved)

Perform the following steps to map a database to wInsight on your local hard drive (C:\)

1. Copy the existing blank61.mdb database and rename for your use. (DO NOT CUT OR DELETE THIS EXISTING DATABASE AS IT IS NEEDED TO CREATE ADDITIONAL DATABASES IN THE FUTURE)

- a. Copy blank61.mdb from the following location: C:\Program Files\CSSI6\Data\Access
- b. Paste blank61.mdb to the following location: C:\Program Files\CSSI6\Data
- c. Rename blank61.mdb to something more descriptive
- d. Close all folders

2. Map wInsight to the new database created above

- a. Open wInsight 6.1 Administrator
- b. Click FILE
- c. Click SELECT DATABASE
- d. Choose ADD from the Select Data Source pop up box
- e. Name the New Data Source to match the name of the database to eliminate confusion
- f. Choose Microsoft Jet 4.0 OLE DB Provider
- g. Click Next to go to the CONNECTION time
 - i. Box 1 - Select Database name by browsing and pointing to the database created in step 1 above.
 - ii. Box 2 - REMOVE the word "Admin"
 - iii. Click OK

3. Repeat steps 1 and 2 above to create additional databases on your local hard drive if needed.

Note:

- When the "Database Login Box" appears, leave both the "Name" and "Password" blank,
- When the "Application Login Box" appears, leave both the "User Name" and "Password" blank.



2. Tips for Getting Around in wInsight (Administrator 6.1)



1. To move from one database to another choose File, Database, and choose from the drop-down menu.
2. The name of the currently selected database is displayed in the upper left corner under the toolbar.
3. Under the database name are three selections...Data Input, Reports, Dataset.
4. Care should be taken when under the Data Input selection as changes made here are Permanent.
5. To view the contracts contained in the database expand Dataset, double-click Contracts and then expand Contracts. Expand the individual contract names to view the periods where data has been loaded.
6. To view the CPR formats, double-click a month, then expand Reports, and double-click a format
7. For ease of changing between contracts and periods go to Options, Toolbars, and be sure that Dataset is highlighted.



3. Updating the Local Database (C:\ drive)

When you receive data from the contractor each month, the first step is to update the local database.

1. Open wInsight Administrator 6.1
2. File - Select Database - Choose your local database from the drop-down menu, OK, OK (no name or password)
3. Load the files submitted by the contractor
 - a. IMPORT .TRN or .XML files:
 - i. Utilities, Import, Browse [to: the location of the file submitted from the contractor], OPEN
 - ii. OPTIONS - **Make sure all are checked EXCEPT "User (Security) Data"**, OK, OK
 1. If there are errors or warnings that will affect your data or that you don't understand - CANCEL, CLOSE and Call the wInsight POC.
 2. If no errors, OPTIONS, **Make sure all are checked EXCEPT "User (Security) Data"**, OK, OK
 3. If "Import Succeeded", CLOSE
 4. If "Import Failed", Call the wInsight POC.
 5. Repeat this process for each contract
 6. Utilities, Recalculate, (hold down "Control" key and select all contracts Imported), highlight "All Periods", OPTIONS, check ONLY "calculate element hierarchy", OK, OK, CLOSE when "done".
 - b. RESTORE .WSA files:
 - i. Utilities, Restore, Browse [to: the location of the file submitted from the contractor], OPEN
 - ii. OK
 - iii. OPTIONS, uncheck User (Security) Data, OK
 - iv. OK
 - v. When Import "Succeeded", CLOSE
 - vi. Repeat this process for each contract
 - vii. There is no need to Recalculate when Restoring a .WSA file
 4. Check the data for errors and fix any errors BEFORE backing up and updating the Server Database.



4. How To Backup Data on the Local Database (C:\ drive)



It is recommended that a backup is created of the monthly data received on the local database (Create a .WSA file).

1. Open wInsight Administrator 6.1
2. File, Select Database, Choose the local database from the drop-down menu, OK, OK (no name or password)
3. Utilities, Backup
 - a. Select the contract(s) to backup
 - b. Click Browse
 - c. Choose a location and name for the file
 - d. Save as type .WSA (default)
 - e. Click OK
 - f. When “Done”, click Close

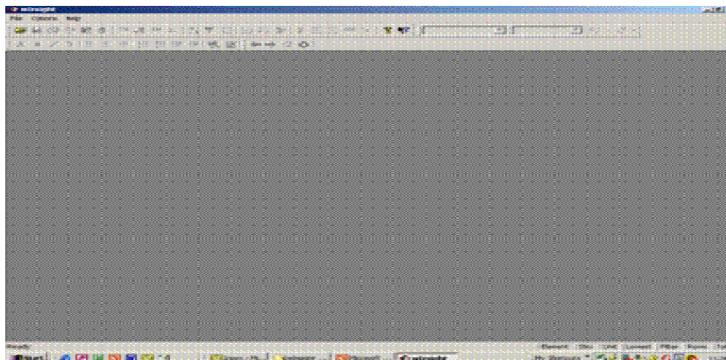


5. Accessing the Data Using wInsight 6.1

1. Open wInsight 6.1

(NOTE: The following process is shortened if you do a “Save Workspace” after following these steps the first time – see page 12)

2. File – Select Database – Select your Local Database from the drop-down menu – OK



If your screen looks similar to the snapshot on the right, then you have a data set open. Click **File – Close** to close out of the data set.

Your screen should look similar to the snapshot on the left (no data set open). If you have a data set open, you will not have the option under **File** to **Select Database**.



DISCRETE	L1	L2	L3	L4	WBS	CV	INC	INC
1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5
6	6	6	6	6	6	6	6	6
7	7	7	7	7	7	7	7	7
8	8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12	12
13	13	13	13	13	13	13	13	13
14	14	14	14	14	14	14	14	14
15	15	15	15	15	15	15	15	15
16	16	16	16	16	16	16	16	16
17	17	17	17	17	17	17	17	17
18	18	18	18	18	18	18	18	18
19	19	19	19	19	19	19	19	19
20	20	20	20	20	20	20	20	20
21	21	21	21	21	21	21	21	21
22	22	22	22	22	22	22	22	22
23	23	23	23	23	23	23	23	23
24	24	24	24	24	24	24	24	24
25	25	25	25	25	25	25	25	25
26	26	26	26	26	26	26	26	26
27	27	27	27	27	27	27	27	27
28	28	28	28	28	28	28	28	28
29	29	29	29	29	29	29	29	29
30	30	30	30	30	30	30	30	30
31	31	31	31	31	31	31	31	31
32	32	32	32	32	32	32	32	32
33	33	33	33	33	33	33	33	33
34	34	34	34	34	34	34	34	34
35	35	35	35	35	35	35	35	35
36	36	36	36	36	36	36	36	36
37	37	37	37	37	37	37	37	37
38	38	38	38	38	38	38	38	38
39	39	39	39	39	39	39	39	39
40	40	40	40	40	40	40	40	40
41	41	41	41	41	41	41	41	41
42	42	42	42	42	42	42	42	42
43	43	43	43	43	43	43	43	43
44	44	44	44	44	44	44	44	44
45	45	45	45	45	45	45	45	45
46	46	46	46	46	46	46	46	46
47	47	47	47	47	47	47	47	47
48	48	48	48	48	48	48	48	48
49	49	49	49	49	49	49	49	49
50	50	50	50	50	50	50	50	50
51	51	51	51	51	51	51	51	51
52	52	52	52	52	52	52	52	52
53	53	53	53	53	53	53	53	53
54	54	54	54	54	54	54	54	54
55	55	55	55	55	55	55	55	55
56	56	56	56	56	56	56	56	56
57	57	57	57	57	57	57	57	57
58	58	58	58	58	58	58	58	58
59	59	59	59	59	59	59	59	59
60	60	60	60	60	60	60	60	60
61	61	61	61	61	61	61	61	61
62	62	62	62	62	62	62	62	62
63	63	63	63	63	63	63	63	63
64	64	64	64	64	64	64	64	64
65	65	65	65	65	65	65	65	65
66	66	66	66	66	66	66	66	66
67	67	67	67	67	67	67	67	67
68	68	68	68	68	68	68	68	68
69	69	69	69	69	69	69	69	69
70	70	70	70	70	70	70	70	70
71	71	71	71	71	71	71	71	71
72	72	72	72	72	72	72	72	72
73	73	73	73	73	73	73	73	73
74	74	74	74	74	74	74	74	74
75	75	75	75	75	75	75	75	75
76	76	76	76	76	76	76	76	76
77	77	77	77	77	77	77	77	77
78	78	78	78	78	78	78	78	78
79	79	79	79	79	79	79	79	79
80	80	80	80	80	80	80	80	80
81	81	81	81	81	81	81	81	81
82	82	82	82	82	82	82	82	82
83	83	83	83	83	83	83	83	83
84	84	84	84	84	84	84	84	84
85	85	85	85	85	85	85	85	85
86	86	86	86	86	86	86	86	86
87	87	87	87	87	87	87	87	87
88	88	88	88	88	88	88	88	88
89	89	89	89	89	89	89	89	89
90	90	90	90	90	90	90	90	90
91	91	91	91	91	91	91	91	91
92	92	92	92	92	92	92	92	92
93	93	93	93	93	93	93	93	93
94	94	94	94	94	94	94	94	94
95	95	95	95	95	95	95	95	95
96	96	96	96	96	96	96	96	96
97	97	97	97	97	97	97	97	97
98	98	98	98	98	98	98	98	98
99	99	99	99	99	99	99	99	99
100	100	100	100	100	100	100	100	100

3. Database Login: Leave both Name and Password blank - OK
4. File – Open
5. Application Login:
 - a. User Name leave blank
 - b. Password leave blank – OK
6. Double-click the contract name
7. Highlight the desired period – OK
8. You will want to add the “Data Set” Toolbar to quickly move between contracts and periods. If provided by the contractor, you can toggle between WBS & OBS and Dollars & Hours. Click Options – Toolbars – check Dataset.



6. Creating a Custom View

"Views" icon

■ Click the "Views" icon

■ Select a similar view and click Copy

■ Re-name the new view

■ Add, delete or move fields

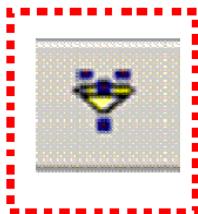
The screenshot shows the WinSight software interface. A red dashed box highlights the "Views" icon in the toolbar. A red circle highlights the "More Views" button in the toolbar. A red arrow points from the "Views" icon to the "More Views" button. A red box highlights the "Copy" button in the "More Views" dialog. A red arrow points from the "Copy" button to the "View Definition" dialog. The "View Definition" dialog shows a table of columns and their titles, with the title "Copy of PM Summary" entered. A red arrow points from the "Name" field in the "View Definition" dialog to the "Copy of PM Summary" entry in the "More Views" list. The main data grid shows various project elements like CH 53 HLR Risk, Contract Milper, and Program Management.

	Description	LVL	LL	SV	CV	VAC	VAR	SV	CV	VAC
1	CH 53 HLR Risk	1		↑	↑	↑	S	-8,440.8	1,756.7	3,215.7
2	Contract Milper	2						0.0	0.0	0.0
3	Program Managem	3	↓							
4	Off Brief CDRL	3	↓							
5	Reserved	2	↓							
6	Requirements	2								
7	Program/Acquisi	3								
8	Reserved-	4	↓							
9	Integrated Prod	4	↓							
10	Meetings & Revi	4	↓							
11	Cost & Schedule	4	↓							
12	Integrated Data	4	↓							
13	Data Deliverabl	4	↓							
14	Preliminary IMS	4	↓							
15	Reserved-2	4	↓							
16	Reserved-3	4	↓							
17	Reserved-1	4	↓							
18	Review Gouverne	4	↓							
19	Reserved-4	4	↓							
20	System Requirem	4	↓	↑						
21	System Function	4	↓							
22	Risk Reduction 2	4	↓	↔						
23	Source Selectio	4	↓	↓						
24	System Engineer	3		↑						
25	System Engineer	4	↓	↔						
26	Trade Studies	4	↓	↑						
27	Requirements De	4	↓	↑						
28	Risk Management	4	↓	↑						
29	Weight Control	4	↓	↔						



7. Creating Custom Filters

“Filter” icon



▪ Click the
“Filter” icon

▪ Select a
similar filter
and click
Copy

▪ Re-name
the new
filter

▪ Edit, add,
delete or
move fields

The screenshot shows the Cost Element software interface with a table of cost elements. A context menu is open over the table, and the 'More filters...' option has been selected. This has triggered a 'Filter Definition' dialog box. The dialog box contains the following information:

- Name: Copy of Level 1 Only
- Show in Filter menu:
- Pre-Logic: Element.ElemLevel
- Field: =
- Test: 1
- Value: \$
- Post-Logic: (empty)

Below the dialog box, the main window shows a table with columns: Description, LVL, ILL, SV, CV, VAC, VAR, SV, CV, and VAC. The table lists various cost elements such as CH 53 HLR Risk, Contract Milest, Program Managem, etc., with their respective values.

Description	LVL	ILL	SV	CV	VAC	VAR	SV	CV	VAC
1 CH 53 HLR Risk				1,756.7				3,215.7	
2 Contract Milest				0.0				0.0	
3 Program Managem				0.0				0.0	
4 Out Brief CDR				0.0				0.0	
5 Reserved				0.0				0.0	
6 Requirements				992.3				992.4	
7 Program/Acquisi				112.9				113.0	
8 Reserved-				0.0				0.0	
9 Integrated Prod				95.3				95.3	
10 Meetings & Rev				-38.6				-38.7	
11 Cost & Schedule				-199.5				-199.5	
12 Integrated Data				0.0				0.0	
13 Data Deliverabl				33.7				33.8	
14 Preliminary IMS									
15 Reserved-2									
16 Reserved-3									
17 Reserved-1									
18 Review Gouverne									
19 Reserved-4									
20 System Requirem									
21 System Function									
22 Risk Reduction 2									
23 Source Selectio									
24 System_Engineer									
25 System_Engineer									
26 Trade Studies									
27 Requirements De	4	4	↑ 1	\$ -1,828.0				-313.0	
28 Risk Management	4	4	↑ 1	\$ -1,522.7				-2.4	
29 Weight Control	4	4	↔ 4 ↓	\$C -175.5				-127.1	



8. Tips for Creating Filters



When creating a filter, try using the question mark "?" as a "wild card" to match any character.

Filter Tests

The Test drop list of the Filter Item Definition dialog box provides a list of tests which can be

used to determine if a match exists between an element field and a specified Filter Value. The complete list of available tests is shown in the following table.

Test Description

=	The field equals the value
<>	The field does not equal the value
<	The field is less than the value
<=	The field is less than or equal to the value
>	The field is greater than the value
>=	The field is greater than or equal to the value
In	The field is one of a set of values (a, b, c)
Not In	The field is not in one of a set of values (a, b, c)
Like	The field matches a wildcard value
Not Like	The field does not match a wildcard value
Is	The field is null (empty, it contains no data)
Is Not	The field is not null (not empty, it contains data)



9. Inserting a Temporary Column into a Current View

- Highlight the column to the right of where you want to insert a new column.

- Right click, choose Column – Insert

- Select the field to insert

- You may change the title of the field, the alignment and width of the column

- To permanently insert the column to the view, you must edit the view itself

The screenshot shows a software application window titled "wInsight - [Sort: SortVal CH-53 HLR RR 2 WBS MAR 06 Dollars]". The main area displays a table with columns: WbsNum, CH 53, LVL, LL, SV, CV, VAR, SV, CV, and VAC. A context menu is open over the second column ("CH 53"). The menu items include: Sort Ascending, Sort Descending, More Sorts..., Copy (Ctrl+C), Filter, Toggle, Column (highlighted in blue), Define..., Insert... (highlighted in blue), Delete, Go To... (Ctrl+G), Freeze Panes, Format..., Font..., Preliminary IMS, Reserved2, Reserved3, Reserved4, Review Governance, System Requirements, System Function, Risk Reduction 2, Source Selection, System Engineer, System Engineer, Trade Studies, Requirements Dev, Risk Management, and Weight Control. Red arrows point from the numbered steps in the list below to specific menu items or table cells. The status bar at the bottom shows "Insert a new column" and various toolbars and tabs.

WbsNum	CH 53	LVL	LL	SV	CV	VAR	SV	CV	VAC
1 EVAA7	CH 53	1		↑	↑	S	-8,440.8	1,756.7	3,215.7
2 EV-AA7.1	Contract	2					0.0	0.0	0.0
3 EV-AA7.1.01	Program	3	↑				0.0	0.0	0.0
4 EV-AA7.1.02	Out Brief	3	↑				0.0	0.0	0.0
5 EV-AA7.2	Reserve	2	↑				0.0	0.0	0.0
6 EV-AA7.3	Requires	2	↑	↑	↑	S	-7,128.8	992.3	992.4
7 EV-AA7.3.01	Program	2	↑	↑	↑		-291.3	112.9	113.0
8 EV-AA7.3.01.01	Reserve	3	↑				0.0	0.0	0.0
9 EV-AA7.3.01.02	Integrat	4	↑	↓	↑	SC	-70.5	-38.6	-38.7
10 EV-AA7.3.01.03	Meeting	4	↑	↑	↑	scCV	0.0	-199.5	-199.5
11 EV-AA7.3.01.04	Cost &	4	↑				0.0	0.0	0.0
12 EV-AA7.3.01.05	Integrat	4	↑				0.0	0.0	0.0
13 EV-AA7.3.01.06	Data De	4	↑	↓	↑	C	0.0	33.7	33.6
14 EV-AA7.3.01.07	Preliminary	4	↑	↑	↓	C	-36.7	-146.9	-146.8
15 EV-AA7.3.01.08	IMS	4	↑				0.0	0.0	0.0
16 EV-AA7.3.01.09	Reserved2	4	↑				0.0	0.0	0.0
17 EV-AA7.3.01.10	Reserved3	4	↑				0.0	0.0	0.0
18 EV-AA7.3.01.11	Reserved1	4	↑				0.0	0.0	0.0
19 EV-AA7.3.01.12	Review Gove	4	↑				0.0	0.0	0.0
20 EV-AA7.3.01.13	Risk Governance	4	↑				0.0	0.0	0.0
21 EV-AA7.3.01.14	Reserved4	4	↑				0.0	0.0	0.0
22 EV-AA7.3.01.15	System Requir	4	↑	↑	↑	S	-165.1	-0.6	-0.6
23 EV-AA7.3.01.16	System Function	4	↑	↑	↑		0.0	0.0	0.0
24 EV-AA7.3.01.17	Risk Reduction	4	↑	↑	↑	C	0.0	323.5	323.5
25 EV-AA7.3.01.18	2	4	↑	↑	↑	C	0.0	45.9	45.9
26 EV-AA7.3.02.01	Source Selection	3	↑	↑	↑	S	-5,140.7	325.1	325.1
27 EV-AA7.3.02.02	System Enginee	4	↑	↑	↑	SC	-276.7	334.1	334.0
28 EV-AA7.3.02.03	System Enginee	4	↑	↑	↑	S	-1,022.4	114.9	114.9
29 EV-AA7.3.02.04	Trade Studies	4	↑	↑	↑	S	-1,828.0	-313.0	-313.1
30 EV-AA7.3.02.05	Requirements Dev	4	↑	↑	↑	S	-1,522.7	-2.4	-2.2
31 EV-AA7.3.02.06	Risk Management	4	↑	↑	↑	SC	-175.5	-127.1	-127.1
32 EV-AA7.3.02.07	Weight Control	4	↑	↑	↑				



10. Saving a Workspace

- Open any views and reports and customize the size and location using your mouse

- Choose File – Save Workspace

- The next time you open wInsight this will be your default view

- Change the contract or the period and the windows automatically update

- Choose File - Save Workspace As and save a workspace to a local folder for future use

The screenshot shows the wInsight software interface with several windows open:

- Main Window:** Titled "wInsight - CH-53 HLR RR 2 WBS MAR 06 Dollars". The menu bar includes File, Edit, Charts, Reports, Input, Options, Window, and Help. The "File" menu is open, showing options like Open..., Close, Page Setup..., Print..., and Save Workspace As... (which is highlighted). Below the menu is a toolbar with various icons. A large grid table displays financial data.
- Format 5 Narrative Window:** Titled "Format 5 Narrative - CH-53 HLR RR 2 WBS MAR 06 Dollars". It contains sections for Executive Summary and Detailed Report, providing narrative details about the contract.
- Executive Summary Window:** A detailed report section from the Format 5 Narrative window, titled "Executive Summary". It discusses the CH-53 HLR Risk Reduction 2 program and its objectives.



11. Viewing wInsight's Existing Reporting Options

The screenshot displays the wInsight application interface. On the left, a navigation pane lists various project elements: EVAAT, EVAAT.1, EVAAT.1.01, EVAAT.1.02, EVAAT.2, EVAAT.3, EVAAT.3.01, EVAAT.3.01.01, EVAAT.3.01.02, EVAAT.3.01.03, EVAAT.3.01.04, EVAAT.3.01.05, EVAAT.3.01.06, EVAAT.3.01.07, EVAAT.3.01.08, EVAAT.3.01.09, and EVAAT.3.01.10. A callout bubble points to the 'EVAAT' entry. The main workspace shows two windows side-by-side. The left window is titled 'Six Period Summary' and contains a grid of data with columns labeled 'WkNum', 'WebNum', 'Wk', 'LL', 'DV', 'CV', 'AC', 'VAR', 'DV', 'CV', and 'VAR'. The right window is also titled 'Six Period Summary' and is specifically titled 'CH-53 HLR RR 2 MAR 06 Dollars'. It displays a detailed breakdown of financial data over six periods (NOV05, DEC05, JAN06, FEB06, MAR06) for categories like ECWS, ECWF, ACWP, SCH FAR, COST FAR, and CFI, along with various percentage and cumulative values.

- Select **Reports** and simply choose the report you wish to view
- Double-click on a lower element to view the report by element
- To return to the previous view, close the report



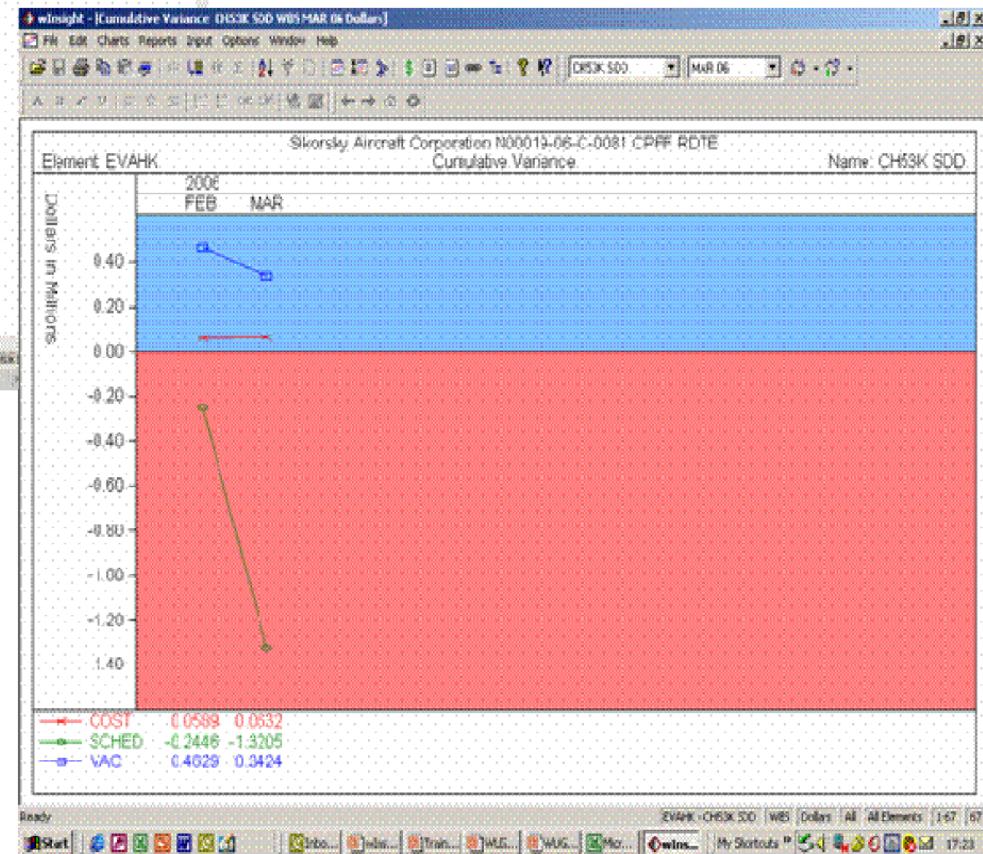
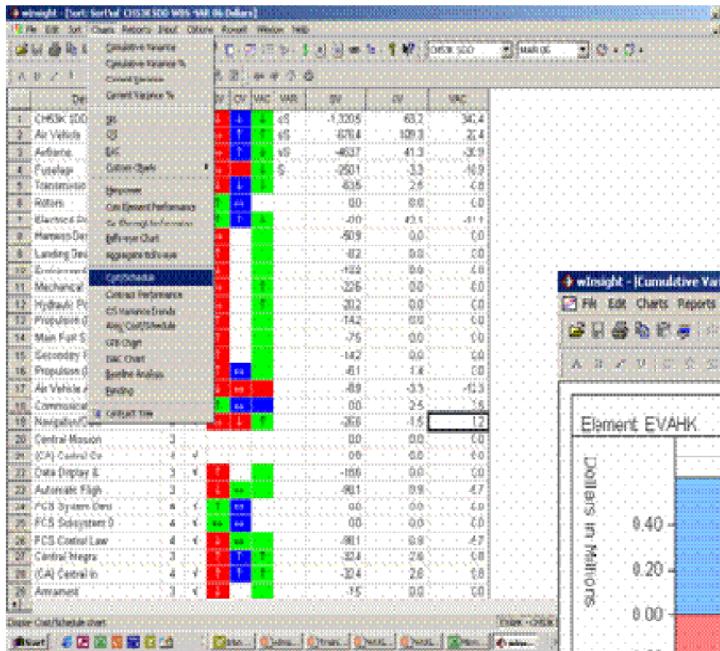
12. Creating Custom Reports

- Choose Reports - Custom Reports – More Reports
- Select New to generate the report path
- Provide a report Name and Template file for the report.
- Template files are created using an HTML editor, using the Database field names to generate a report format & query the database for data.

The screenshot shows the Winsight software interface. The main window displays a grid of data with columns labeled CV, VAC, VAR, SV, CV, and VAC. The rows list various system components such as CH53K SDD, Air Vehicle, Airframe, Fuselage, etc. A context menu is open over the grid, with 'Custom Reports' selected, which has led to the 'More Reports' dialog box appearing. This dialog lists several report types: AI Narrative, Element of Cost, Executive Summary, Format 5 Narrative, Scope of Work, Six Period Summary, User Narrative, and Validity. Below this list are buttons for 'Display', 'Close', 'New', 'Copy', 'Edit', and 'Delete'. In the foreground, a 'Report Definition' dialog box is open, prompting for a 'Name' (set to 'Report1') and a 'Template File' (set to 'Report1_template.htm'). There is also a checked checkbox for 'Show in Report menu'. The bottom of the screen shows the Windows taskbar with icons for Start, Task View, File Explorer, and others.



13. Viewing wInsight's Existing Charts



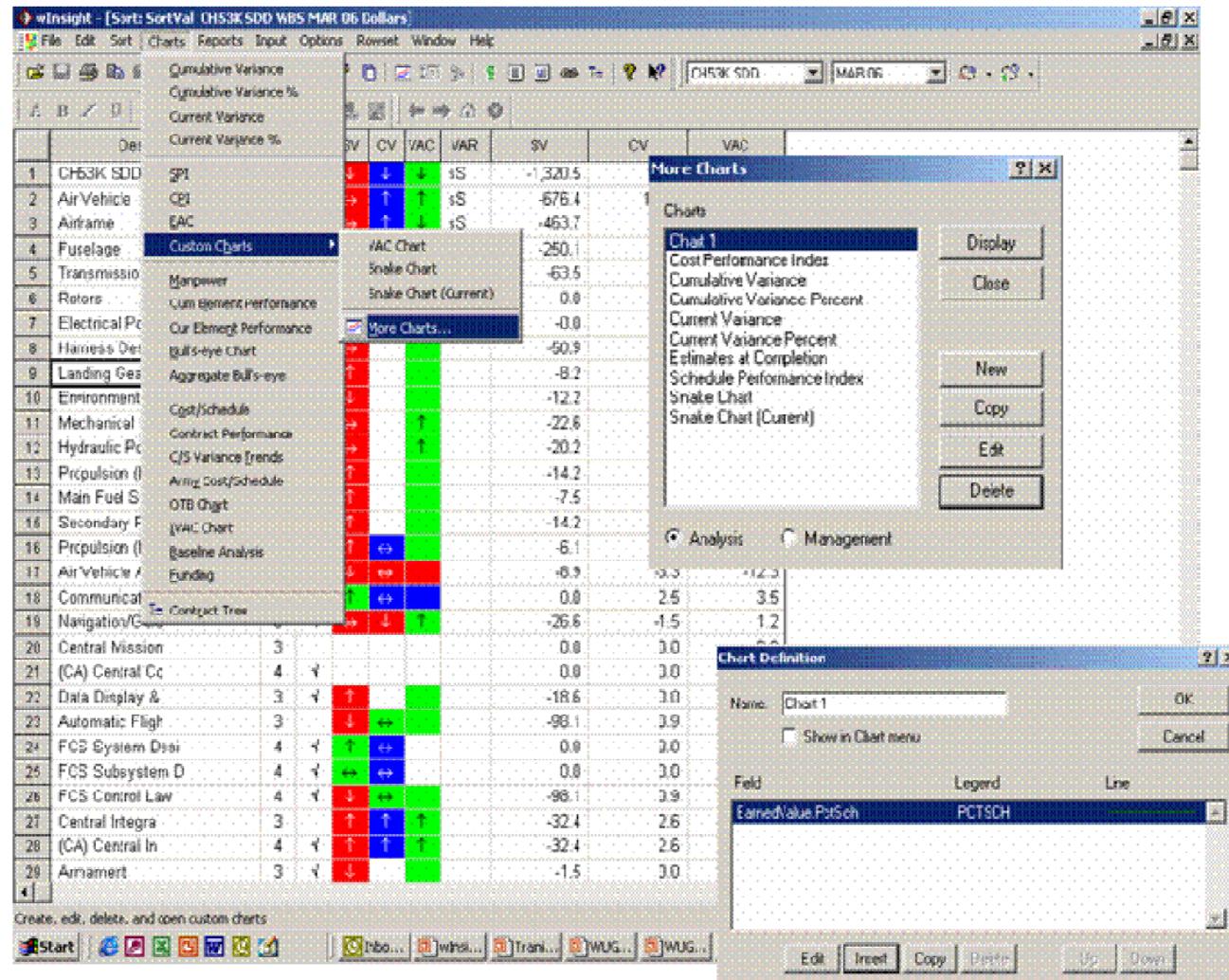
- Select **Charts** and simply choose the report you wish to view
- Double-click on a lower element to view the chart by element
- To return to the previous view, close the



14. Creating Custom Charts



- Choose Charts
 - Custom Charts
 - More Charts
 - Select New to generate the chart
 - Provide a report Name and Edit the chart as necessary.





15. Sharing Custom Views/Filters



- Exit out of data set

- Choose **Window – Close All**

- Select **File – Export Custom Items**

- Save the file

WSCUSTOM.XML to any folder

- Send this file to the receiving computer

- On the receiving computer, be sure all data sets are closed and Select **File – Import Custom Items**

- Open the **WSCUSTOM.XML** file

- Select how you want the charts, filters, and views in the **WSCUSTOM.XML** file to be merged with your existing ones and click the **OK** button

